



# WORKFORCE PLANNING AND DEVELOPMENT

CONTINUITY OF OPERATIONS • RECRUITMENT • ENGAGEMENT • RETENTION • DEVELOPMENT

## AGENCY PROFILE



## INSTRUCTIONAL GUIDE

*UPDATED: APRIL 2023*

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# 1.0 Workforce Planning Background

In 2017, the Virginia General Assembly created a legislative mandate ([§ 2.2-1209. Agency director human resource training and agency succession planning](#)) which requires the director of each agency in the executive branch of state government include in the agency's annual strategic plan its key workforce planning issues. DHRM's charge is to establish guidelines for the content of such workforce and succession plans.

Since then, DHRM has provided various tools and an Excel based Workforce Planning and Development report template to guide agencies on what workforce planning information to evaluate and include.

In 2022, DHRM has focused on realigning the strategy to workforce planning that incorporates a more holistic approach and focuses on the areas of continuity of operations, recruitment, retention/engagement, and workforce development. DHRM is developing tools and templates using a modular design approach, which enables DHRM to build a suite of integrated and customizable workforce planning tools for agencies.

## 2.0 Agency Profile Template

As part of the modular design approach, DHRM has created an Agency Profile Template, which is the starting point for the workforce planning process. This template collects general agency and workforce information that is used in conjunction with other tools and can be directly imported into other tools without having to re-enter data.

The Agency Profile allows the agency to customize elements of their workforce planning strategy and outlines how Agencies can go beyond a foundational level of workforce planning, to an in-depth and even comprehensive level of workforce planning.

Though it is based in Microsoft Excel, it is not designed as a traditional workbook or worksheet. The template is organized by grouping key information on various tabs, indicated at the bottom of the template, which builds upon previous tabs.

- **Home** - The Home tab is a central place for users to navigate to the different tabs, track their progress of each step, and to see what version of the template is being used.
- **Getting Started** – The Getting Started tab reviews important features, setup, and instructions for using this template to its full potential. *It is highly encouraged for users to review this tab.*
- **Customizations** – The Customizations tab identifies aspects of the workforce planning tools and templates that can be customized to the specific agency, such as employee classifications and executive team positions.
- **Sub Agency & Internal Tool and Internal Plan Review** – These are optional tabs to customize the setup of the Sub-Agency, Internal Department, or Internal Team Input tool to support the workforce planning process. *Initially hidden until the tool is enabled.*
- **Agency Details** – The Agency Details tab identifies general agency information, such as name, secretariat, number, total positions (overall, leaders, and executives), and strategic plan information. Though some data elements are optional, they may be required to utilize other tools or templates.
- **Agency Workforce** – The Agency Workforce tab identifies the workforce demographic information for employees, leaders, and executives at the agency.
- **Profile Summary** – The Profile Summary Tab provides a brief workforce insights summary of the agency profile, with filters between fiscal years. The workforce insights summary can also be exported as a standalone PDF if desired or can be formatted and exported as an Appendix to the Agency Workforce Plan.

The template also uses a series of Excel Macros, specific procedures that can automate processes, to increase the template's functionality and ease of use. Macros must be enabled in order to use these functions. However, the template is also designed so that it can be used without Marcos if an agency wishes, but would requires some manually steps when completing specific sections. More information on the design on the template are reviewed in the “Getting Started Tab” section.

## 3.0 Workforce Planning Data Definitions

The Agency Profile begins the Workforce Planning and Development process at the Agency. To promote alignment, definitions for specific data metrics are outlined in the [Workforce Planning Data Definitions document](#) on the DHRM Website.


The Agency Profile includes data elements defined in both the General Definitions and Agency Profile Template sections of the data definitions document.

Please review the data definitions document for specific definitions as needed.

## 4.0 Tab Guides

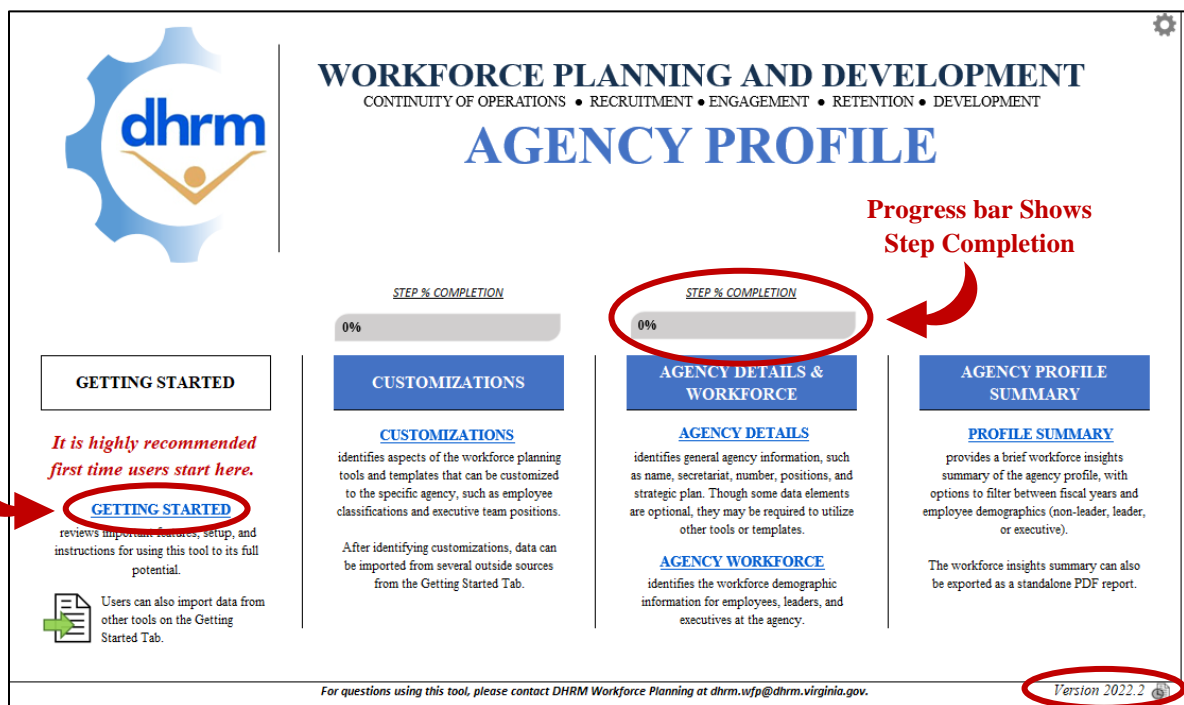
The Agency Profile template is divided into several tabs that house similar information. It is recommended for users to progress through the tabs from left to right, beginning with the Home Tab.

### Home Tab

The Home tab is a central place for users to see a description of and navigate to the different tabs, track their progress of each step, and to see what version of the template is being used. The version number is located in the bottom right corner of the home tab, and is represented by the  icon.

Each of the tab names, highlighted in blue, are hyperlinks to the tabs. Click on any of the names to navigate to the respective tab.

To begin using the template, click on the “Getting Started” Tab name in blue.



### Getting Started Tab

The Getting Started tab reviews important features, overall setup, and some instructions on how to begin using the Agency Profile Plan template. Though it is not required to review, **it is highly recommended users spend time to review this information.**

The tab begins with a quick overview and description of the contents.



## Step 1: Review Overall Setup

The Getting Started tab provides a breakdown of the overall setup for the remaining tabs. Each tab follows the general setup of having the step number and title on the left hand side, a set of instructions underneath, and the required data to be entered labeled (either above or to the left).

Cells with a yellow background indicate required information to be entered and cells with a green background are optional. Once all the required information is entered, the step indicator will change from **Incomplete** to **Complete**.

Click to view help  
(NOTE: cannot edit file while help is open)

Step Number and Title

Complete / Incomplete Indicator for Step

Instructions on how to complete the step

Sub-Step Number and Title

NOTE: Calculations & Formulas for Data Metrics are in the Help Window

Step 3: Enter Agency Size & Structure Information

**Complete**

*INSTRUCTIONS: Please enter the maximum employment level and position information for the agency. If the agency wishes to utilize the Sub-Agency or Internal Department review tool (a version of the Agency Profile and Agency Strategy templates), please identify the internal departments and/or sub-agencies. See the instructions for each sub-step for specifics of how to complete each step.*

Step 3(a): Enter Maximum Employment Level (MEL)

**Incomplete**

*INSTRUCTIONS: Enter the maximum employment level (MEL) for the agency in the yellow boxes below for each respective fiscal year. The maximum employment level is the authorized number of salaried full-time equivalent employees at the agency from the Appropriations Act.*

Description of what data to enter in the cell

Maximum Employment Level (MEL)

FY21 FY22


Description of what data to enter in the cell

Cell to enter data (click on cell to enter data)






Some steps may include sub steps, indicated by the step number and letters slightly indented from the left.




## Step 2: Review Important Features of This Tool

The Getting Started tab provides a breakdown of the important features of the template, used to assist with entering and interpreting workforce information. Below are descriptions of the template's key features.

	<h3>USE OF EXCEL MACROS</h3> <p>This template utilizes a series of Excel macros, which are custom actions used to automate specific tasks. This template performs best when using Excel 2016 or later. <b>NOTE: Excel Macros must be enable to use them.</b> The template can also be used without the Macros, but will require some manual edits.</p>
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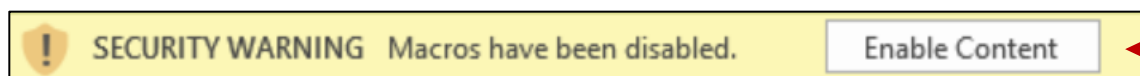


	<p style="text-align: center;"><b>EASY FILE NAVIGATION</b></p> <p>Each Excel Worksheet, or tab, houses related information which is compiled together into a single report. Links to each tab are frozen at the top of each tab to easily navigate between them.</p>
	<p style="text-align: center;"><b>COLOR CODED DATA ENTRY</b></p> <p>Colors are used to identify what data should be entered and where. Yellow indicates required information. Green indicates optional information, and Gray indicates information is not required.</p>
	<p style="text-align: center;"><b>BUILT-IN HELP FEATURES</b></p> <p>This template has a built in help feature. Click on the question mark in the blue circle to open a window with additional information, definitions, and steps to complete. <b>NOTE: Macros must be enabled. The template cannot be edited while help windows are open.</b></p>
<p style="text-align: center;"><b>COMPLETE</b> <b>INCOMPLETE</b></p>	<p style="text-align: center;"><b>PROGRESS INDICATORS</b></p> <p>The home tab provides progress indicators for each step of the template. Each tab also provides progress indicators for each step or sub-step, which show if the step is complete or incomplete.</p>
	<p style="text-align: center;"><b>DATA IMPORT</b></p> <p>This template is part of a suite of integrated workforce planning and development tools. Using these tools allows for information to easily be imported from one tool to the next. Data cannot be imported unless using a specific template, provided by DHRM upon request. <b>NOTE: MACROS MUST BE ENABLED TO UTILIZE THIS FEATURE.</b></p>
	<p style="text-align: center;"><b>TEMPLATE VERSIONS</b></p> <p>As we continue to enhance this template, integrate it with other elements of workforce planning and development, or as changes to any mandates or guidance occurs, new versions of this template may be released. The version number is located on the Home tab in the bottom right corner.</p> <p>It is important to be using the most up to date version, which will be noted on the DHRM Workforce Planning Website. As new versions are released, the prior version data can be imported so no progress is lost.</p>

<p><b>FOUNDATIONAL</b></p>  <p><b>IN-DEPTH</b></p>  <p><b>COMPREHENSIVE</b></p> 	<p style="text-align: center;"><b>INCREASING LEVELS OF ANALYSIS</b></p> <p>To better assist with navigating the landscape of workforce planning and development, the suite of integrated tools and templates provide indicators for three levels of analysis: foundational, in-depth, and comprehensive. These levels are used to better identify why information is collected and how it can be used throughout the tools and templates.</p> <p>All foundational level elements are required and both the in-depth and comprehensive elements are highly encouraged, but optional.</p>
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### **(Optional) Step 3: Enable Macros to Utilize Full Functionality**

To ensure Macros are enabled, when first opening the file or anytime the filename changes, you will see a “Security Warning” at the top (shown in the picture below) indicating Macros have been disabled. Click the “Enable Content” button to enable macros for the file.



Click to Enable Macros

### **(Optional) Step 4-6: Import Data from Other Sources**

For efficiency and integration to other workforce planning and development tools, data from other sources can be imported. Imported data, shown in the table below, will automatically enter the information into the respective cells. Agencies are encouraged to still review the information for accuracy.

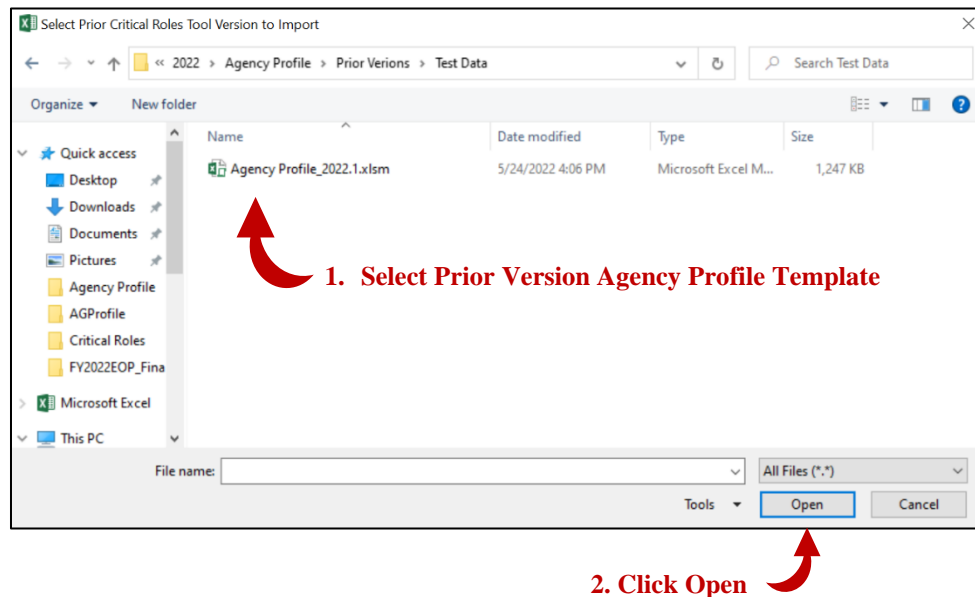
Data Source	Data Imported
Agency Profile (Prior Version)	All Previously Entered Data
Most Recent Employment Opportunities Plan	Strategic Plan Objectives and Action Items
Prior Year Agency Profile	All Information Entered from the Prior Year, which will be reflected in the PY Columns

The example below is how to import data from a prior Agency Profile template, however, the process is the same for all data import options.

To import the data, click on the Import Data Icon  for the tool the data is imported from (such as a previous version of the Agency Profile).



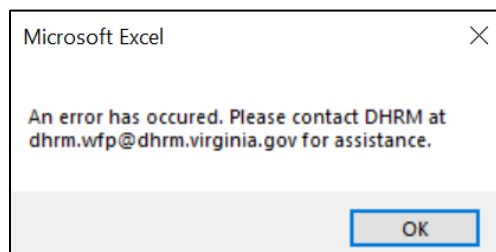
This will open the standard “Open File” dialog box. Simply locate and select the previous version Agency Profile template and click “Open”. (Shown in the picture below).



If the data is imported successfully, the template will indicate the date and time the data was imported (shown in the picture below).

Last Uploaded Date and Time	Upload Status
4/12/2022 14:55	Upload Complete

If the data import was unsuccessful, the dialog box (in the picture below) will indicate an error occurred and to contact DHRM Workforce Planning at [dhrm.wfp@dhrm.virginia.gov](mailto:dhrm.wfp@dhrm.virginia.gov).



### **(Optional) Step 6(a): Importing the Employment Opportunities Plan**

Prior to importing the Employment Opportunities plan, first complete Step 6(a) which identifies which of the strategic objectives from the Employment Opportunities Plan should be imported.

For each objective, first identify if it should be included in the Agency Profile by selecting either “Yes” or “No” from the dropdown menu (shown in the picture below).

### Step 6(a): Identify which Objectives from the EOP to Include

**INSTRUCTIONS:** Identify which objectives from the EOP to include by selecting "yes" from the dropdown menu of the "Include" column below for the respective EOP objectives to include. Next, identify if the objective should be added to the existing strategic objectives for the Future Direction section on the Agency Details tab, or if it should replace an existing objective. If replacing an objective, identify which objective should be replaced by entering the objective number in the "Replace" column.

	Include	Add or Replace	Replace Which Profile Obj.	Replace
EOP Objective 1			Replace Which Profile Obj.	
EOP Objective 2			Replace Which Profile Obj.	
EOP Objective 3			Replace Which Profile Obj.	
EOP Objective 4			Replace Which Profile Obj.	
EOP Objective 5			Replace Which Profile Obj.	

1. Select Either "Yes" or "No" from the dropdown for each objective.

If the objective is going to be included, identify if it should be added to the exiting Future Direction section of the Agency Profile or if it should replace a specific objective. If replacing a specific objective, enter the respective objective number from the Future Direction Section to replace the objective with the selected Employment Opportunities Plan Objective (shown below).

### Step 6(a): Identify which Objectives from the EOP to Include

**INSTRUCTIONS:** Identify which objectives from the EOP to include by selecting "yes" from the dropdown menu of the "Include" column below for the respective EOP objectives to include. Next, identify if the objective should be added to the existing strategic objectives for the Future Direction section on the Agency Details tab, or if it should replace an existing objective. If replacing an objective, identify which objective should be replaced by entering the objective number in the "Replace" column.

	Include	Add or Replace	Replace Which Profile Obj.	Replace
EOP Objective 1	Yes	Add	Replace Which Profile Obj.	
EOP Objective 2	No		Replace Which Profile Obj.	
EOP Objective 3	No		Replace Which Profile Obj.	
EOP Objective 4	No		Replace Which Profile Obj.	
EOP Objective 5	Yes	Replace	Replace Which Profile Obj.	1

2. Select Either "Add" or "Replace" from the dropdown for each included objective.

If replacing, enter the objective number being replaced.

## Customizations Tab

The Customizations tab allows the Agency to customize the employee classifications, the positions identified as part of the executive team, and enabling the use of the Sub-Agency, Internal Department, or Internal Team Tool.

### Step 1: Identify Employee Classifications

To complete step 1, enter the title and a brief description of employee classification the agency uses (such as Classified, Wage, Agency Head, Other Non-Classified, etc.) by clicking the blue “Add Employee Classification” button to show the entry boxes (shown in the picture below). Up to 15 employee classifications can be added.

**To calculate metrics correctly, the classification title should be exactly the same as those in any imported reports. Repeat this process for each additional classification to be added. [If Not Using the Excel Macros, Skip to Step 1\(a\)](#)**

FOUNDATIONAL

**? Step 1: Identify Employee Classifications** Complete

*INSTRUCTIONS: Please enter the different employee classifications at the agency, even if they include only one employee, such as classified, wage, faculty, etc., by clicking the "add classification" button. Up to 15 different employee classifications can be added. Classified and Wage employee classifications are included by default.*

1. Click the “Add Employee Classification” button again to add up to 15 Classifications

2. Enter the Classification Title in the Yellow Box

3. Enter a brief description of the Classification

Classification Title	Description (Very Brief)
Classified	State Employee

Add Employee Classification Remove Last Classification

Classifications can be removed by clicking the blue “Remove Last Classification” button. This will remove the last employee classification was added.

FOUNDATIONAL

**? Step 1: Identify Employee Classifications** Complete

*INSTRUCTIONS: Please enter the different employee classifications at the agency, even if they include only one employee, such as classified, wage, faculty, etc., by clicking the "add classification" button. Up to 15 different employee classifications can be added. Classified and Wage employee classifications are included by default.*

Add Employee Classification Remove Last Classification

Click to Remove Last Added Classification

Classification Title	Description (Very Brief)
Classified	State Employee

### (Optional) Step 1(a): Enter Employee Classifications without Macros

**If the blue buttons were used to enter the Employee Classifications, this step can be skipped.**

In the event Macros are not being used, the Employee Classifications can be entered by first entering the total number of classifications in the green box.

### (Optional) Step 1(a): Enter Employee Classifications if Not Using Macros

If chosen not to use Macros, please enter the total number of employee classifications below. The worksheet will then need to be filtered manually by going to cell "W1" and clicking the Filter Icon. This will display a menu where the checkbox next to "0" should be empty. If it is, click the "OK" button to display the objective and action item entry cells above. Enter the employee classification information in the cells above.

Total Number of Employee Classifications

1. Enter the Total Number of Employee Classifications

After the number is entered, click on the Filter Icon in cell W1 to show the filter menu (top right corner). Ensure there is no check box next to "0" (zero) and then click okay to filter the sheet.

FOUNDATIONAL

Step 1: Identify Employee Classifications

INSTRUCTIONS: Please enter the different employee classifications at the agency, even if they include only one employee, such as classified, wage, faculty, etc., by clicking the "add classification" button. Up to 15 different employee classifications can be added. Classified and Wage employee classifications are included by default.

Add Employee Classification Remove Last Classification

Classification Title	Description (Very Brief)
Classified	State Employee

(Optional) Step 2(a): Enter Employee Classifications if Not Using Macros

If chosen not to use Macros, please enter the total number of employee classifications below. The worksheet will then need to be filtered manually by going to cell "W1" and clicking the Filter Icon. This will display a menu where the checkbox next to "0" should be empty. If it is, click the "OK" button to display the objective and action item entry cells above. Enter the employee classification information in the cells above.

Total Number of Employee Classifications 3

2. Click the filter Icon to show filter menu

FOUNDATIONAL

Step 1: Identify Employee Classifications

INSTRUCTIONS: Please enter the different employee classifications at the agency, even if they include only one employee, such as classified, wage, faculty, etc., by clicking the "add classification" button. Up to 15 different employee classifications can be added. Classified and Wage employee classifications are included by default.

Add Employee Classification Remove Last Classification

Classification Title	Description (Very Brief)
Classified	State Employee

(Optional) Step 1(a): Enter Employee Classifications if Not Using Macros

If chosen not to use Macros, please enter the total number of employee classifications below. The worksheet will then need to be filtered manually by going to cell "W1" and clicking the Filter Icon. This will display a menu where the checkbox next to "0" should be empty. If it is, click the "OK" button to display the objective and action item entry cells above. Enter the employee classification information in the cells above.

Total Number of Employee Classifications 3

Sort Smallest to Largest  
Sort Largest to Smallest  
Sort by Color  
Clear Filter From "1"  
Filter by Color  
Number Filters  
Search  
Select All  
0  
OK Cancel

3. Verify "0" is unchecked

4. Click Ok

Scroll up on the sheet to see the entry boxes for the number of employee classifications. The number of Employee Classifications can be changed using this same process.



## Step 2: Identify Agency Executive Team

To complete step 2, first enter a brief description of the Agency Executive Team or the process used to identify Executive Team positions in the yellow box (shown in the picture below).

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**?** Step 2: Identify Agency Executive Team Complete

**INSTRUCTIONS:** Please enter a brief description on how the agency identifies the Executive Team. After, please identify the specific positions considered to be a part of the executive team by clicking the "add position" button. Please enter the position number, working title, the degree of separation (position levels) from the agency head and if they are in an appointed position or not. Up to 40 positions can be added.

Executive Team Description and/or Process of How Executive Positions were identified.

**1. Enter Executive Team Description**

Next, enter the position number, working title, degree from the Agency Head (number of leadership levels at the Agency), and if the position is an appointed position for any positions the Agency identifies as part of their executive team by clicking the blue "Add Executive Position" button to show the entry boxes (shown in the picture below). Up to 40 executive positions can be added.

To calculate metrics correctly, the position number should be exactly the same as those in any imported reports. Repeat this process for each additional position the Agency wants to identify as part of their executive team. **If Not Using the Excel Macros, Skip to Step 3(a)**

**1. Click the "Add Executive Position" button again to add up to 40 Positions.**

**2. Enter the Position Number**

**3. Enter the Working Title**

**4. Enter the Degree from the Agency Head**

**5. Select "Yes" or "No" if the position is appointed or not.**

Position Number	Working Title	Degree from Agency Head	Appointed?
12345	Agency Head	0	Yes

**Click to Remove Last Executive Position Added**

### (Optional) Step 2(a): Enter Executive Team without Macros

If the blue buttons were used to enter the Executive Team, this step can be skipped.



In the event Macros are not being used, the executive team positions can be entered by first entering the total number of positions in the green box.

***(Optional) Step 2(a): Enter Executive Positions if Not Using Macros***

*If chosen not to use Macros, please enter the total number of executive positions below. The worksheet will then need to be filtered manually by going to cell "W1" and clicking the Filter Icon. This will display a menu where the checkbox next to "0" should be empty. If it is, click the "OK" button to display the objective and action item entry cells above. Enter the executive positions information in the cells above.*

Total Number of Executive Positions

1. Enter the Total Number of Executive Positions

After the number is entered, click on the Filter Icon in cell W1 to show the filter menu (top right corner). Ensure there is no check box next to "0" (zero) and then click okay to filter the sheet.

2. Click the filter Icon to show filter menu

3. Verify "0" is unchecked

4. Click Ok

**(Optional) Step 3 – Enable the Sub-Agency, Internal Department, or Team Input Tool (Macros must be enabled).**

The Sub-Agency, Internal Department, or Team Input Tool is a separate tool, similar to the Agency Profile, that would allow an agency to go through the entire workforce planning process, focusing on specific areas within their agency. This information can then be easily imported into

the full Agency wide strategy. This tool can also be used to gather information from specific areas to support the Agency wide workforce planning process and strategy development.

To enable this tool, click on the toggle switch next to the Tool logo in Step 3 (shown below). It will indicate either “On” or “Off” to show whether it is enabled.



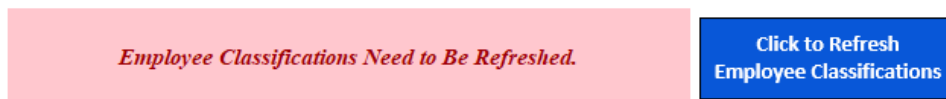
If enabled, two additional tabs will be visible: The Sub Agency & Internal Tool tab and the Internal Plan Review Tab. To complete these tabs, see **Section 4: Internal Tool Setup** of these instructions.

## **Agency Details Tab**

The Agency Details tab identifies information about the agency, beginning with general information and then narrowing in focus. These include the agency name, secretariat, agency number, positions, and structure. This tab also includes information of the agency strategic plans that are impacted by or pertain to the continuity of operations, recruitment, retention, engagement, and/or workforce development.

Before completing any steps on the Agency Details Tab, the employee classification lists will need to be refreshed (if indicated they are not up to date). To refresh employee classifications, click the blue “Click to Refresh Employee Classifications” button.

### **Before**



### **After**

Employee Classifications are Up to Date.

Click to Refresh  
Employee Classifications

If not using Macros, the employee classification list can be refreshed by going to cell “W1” and clicking the filter icon. After, ensure the “0” box is unchecked, click Ok.

### Step 1: Enter Agency Information

To complete step one, entering agency information, select the agency name from the drop down menu in the yellow box (shown in the picture below). To show the dropdown arrow, click in the yellow cell. The secretariat and agency number will be displayed automatically

An optional logo can be added by clicking the “Insert Logo” blue button, selecting the logo picture file, and then resizing the image to be within the green outlined box.

**Step 1: Enter General Agency Information** Incomplete

*INSTRUCTIONS:* Please select the agency name from the drop down menu in the yellow box. The secretary and agency number will be displayed. An optional logo can be added by clicking the “insert logo” button and placing the picture into the box with a green outline.

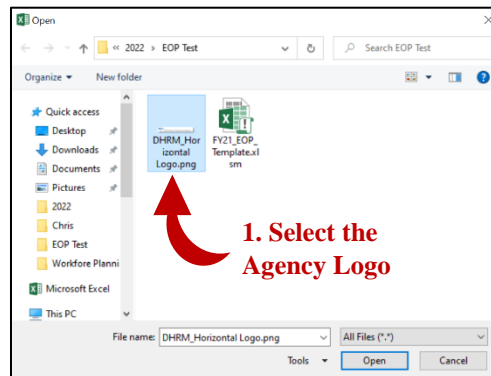
Click for Help if needed

Click the blue button to add an **Optional Agency Logo** (instructions below)

Click to enable resizing of logo. After, click to turn resizing off.

1. Click on Arrow to See Dropdown.  
2. Select Agency from Dropdown.

To add an **optional** Agency Logo, click on the purple button to open the standard “Open File” dialog box. Simply locate and select the Agency Logo and click the “Open” button. **NOTE: The Agency Logo must be a picture file.**



Once added, resize the logo to be within the green outlined box (shown in the picture below) by clicking the “Resize: OFF” blue button. After the Image is resized to be within the green box click the “Resize: On” button.

Before

**Step 1: Enter General Agency Information** Incomplete

**INSTRUCTIONS:** Please select the agency name from the drop down menu in the yellow box. The secretary and agency number will be displayed. An optional logo can added by clicking the "insert logo" button and placing the picture into the box with a green outline.

Enter Agency Name:


Enter Agency Secretariat:

Enter Agency Number:

Optional Agency Logo:

? Insert Logo Resize: ON

Click to enable resizing of logo.  
After, click to turn resizing off.



**After**

**Step 1: Enter General Agency Information** Incomplete

**INSTRUCTIONS:** Please select the agency name from the drop down menu in the yellow box. The secretary and agency number will be displayed. An optional logo can added by clicking the "insert logo" button and placing the picture into the box with a green outline.

Enter Agency Name:


Enter Agency Secretariat:

Enter Agency Number:

Optional Agency Logo:

? Insert Logo Resize: OFF

Click to enable resizing of logo.  
After, click to turn resizing off.



## **Step 2: Enter Agency Operational Information**

Step 2 is comprised of three sub steps, two of which are optional. To complete step 2, only step 2(2a), enter agency mission is required. Steps 2(b) and Step 2(c) are optional but if completed, will provide comprehensive level of analysis when analyzing data and using other workforce planning tools and templates.

### **Step 2(a): Enter Agency Mission**

To complete Step 2(a), enter a brief, high level, description of the agency mission in the yellow box (shown in the picture below).

**Step 2(a): Enter Agency Mission** Incomplete

**INSTRUCTIONS:** Enter a brief, high level, description of the agency mission in the yellow box below. Some items that may be included are what the agency does, who the agency serves, and/or how the agency meets the needs of those they serve.

Agency Mission

1. Enter a brief, high level, description of agency mission.


### **(Optional) Step 2(b): Identify Agency Lines of Service**

To complete Step 2(b), enter the title and brief description of lines of service at the Agency by clicking the blue "Add Line of Service" button. A "Line of Service" is a modified approach to the traditional "line of business". From the Agency mission entered previously, lines of service

can be identified of “how” the agency achieves their mission. Up to 15 lines of service can be added to the Agency Profile. Though this step is optional, it can provide a comprehensive level of analysis when using workforce planning and development tools and templates.

### If Not Using the Excel Macros, Skip to Step 2(b-i)

**COMPREHENSIVE**

 **(Optional) Step 2(b): Identify Agency Lines of Service**

***INSTRUCTIONS:** A “line of service” is a modified approach to the traditional “line of business”. From the agency mission entered previously, lines of service can be identified by the specific “how’s” agencies achieve their mission. Please enter the different lines of service at the agency by clicking the “add line of service” and enter the line of service and a description. Up to 15 different lines of service can be added.*

**1. Click the “Add Line of Service” button again to add up to 15 lines of service.**

**2. Enter Line of Service Title**

**3. Enter Line of Service Description**


Line of Service Title	Description (Very Brief)
Example Line of Service	Example Line of Service

**Add Line of Service** **Remove Last Line of Service**

**Click for Help if needed**

Lines of Service can be removed by clicking the blue “Remove Last Line of Service” button. This will remove the last line of service added.

**COMPREHENSIVE**

 **(Optional) Step 2(b): Identify Agency Lines of Service**

***INSTRUCTIONS:** A “line of service” is a modified approach to the traditional “line of business”. From the agency mission entered previously, lines of service can be identified by the specific “how’s” agencies achieve their mission. Please enter the different lines of service at the agency by clicking the “add line of service” and enter the line of service and a description. Up to 15 different lines of service can be added.*

**Add Line of Service** **Remove Last Line of Service**

Line of Service Title	Description (Very Brief)
Example Line of Service	Example Line of Service

**Click to Remove Last Line of Service Added**

### (Optional) Step 2(b-i): Enter Lines of Service without Macros

**If the blue buttons were used to enter the Lines of Service, this step can be skipped.**

In the event Macros are not being used, the lines of service can be entered by first entering the total number in the green box.

#### (Optional) Step 2(b-i): Enter Lines of Service if Not Using Macros

*If chosen not to use Macros, please enter the total number of lines of service below. The worksheet will then need to be filtered manually by going to cell “W1” and clicking the Filter Icon. This will display a menu where the checkbox next to “0” should be empty. If it is, click the “OK” button to display the objective and action item entry cells above. Enter the lines of service information in the cells above.*

Total Number of Lines of Service

**1. Enter the Total Number of Lines of Service**



**2. Click the filter Icon to show filter menu**

**3. Verify "0" is unchecked**

**4. Click Ok**

**(Optional) Step 2(b): Identify Agency Lines of Service**

**INSTRUCTIONS:** A "line of service" is a modified approach to the traditional "line of business". From the agency mission entered previously, lines of service can be identified by the specific "how's" agencies achieve their mission. Please enter the different lines of service at the agency by clicking the "add line of service" and enter the line of service and a description. Up to 15 different lines of service can be added.

Line of Service Title	Description (Very Brief)
Example Line of Service	Example Line of Service

**(Optional) Step 2(b-i): Enter Lines of Service if Not Using Macros**

If chosen not to use Macros, please enter the total number of lines of service below. The worksheet will then need to be filtered manually by going to cell "W1" and clicking the Filter Icon. This will display a menu where the checkbox next to "0" should be empty. If it is, click the "OK" button to display the objective and action item entry cells above. Enter the lines of service information in the cells above.

Total Number of Lines of Service:

### **(Optional) Step 2(c): Identify Agency Physical Locations**

To complete Step 2(c), enter the location name, county of location, lines of service at the location, and positions at the location (total, leader, executive) by clicking the blue "Add Location" button. The Agency can determine the best way to identify multiple locations, such as those staffed by the same group of employees or in close proximity to one another. Up to 25 locations can be added to the Agency Profile. Though this step is optional, it can provide a comprehensive level of analysis when using workforce planning and development tools and templates.

**If Not Using the Excel Macros, Skip to Step 2(c-i)**

COMPREHENSIVE

**(Optional) Step 2(c): Identify Agency Physical Locations**

**INSTRUCTIONS:** Please enter the different physical locations the agency operates by clicking the "add location". Multiple locations in close proximity can be considered one location. Enter the location name, county that best matches the location, the lines of service at that location, and the total positions, leader positions, and executive positions at the location. Up to 25 different locations can be added.

Click for Help if needed

1. Click the "Add Location" button again to add up to 25 locations.

Add Location

Remove Last Location

Location Name	County of Location	Lines of Service at Location	Total Positions	Leader Positions	Executive Positions
Location 1	Richmond-City	Example Line of Service	10	4	2

2. Enter Location Name

3. Select County of Location

4. Add Lines of Service at Location

5. Enter Total Positions

6. Enter Total Leader Positions

7. Enter Total Executive Positions

Locations can be removed by clicking the blue "Remove Last Location" button. This will remove the last location added.

COMPREHENSIVE

**(Optional) Step 2(c): Identify Agency Physical Locations**

**INSTRUCTIONS:** Please enter the different physical locations the agency operates by clicking the "add location". Multiple locations in close proximity can be considered one location. Enter the location name, county that best matches the location, the lines of service at that location, and the total positions, leader positions, and executive positions at the location. Up to 25 different locations can be added.

Add Location

Remove Last Location

Click to Remove Last Location Added

Location Name	County of Location	Lines of Service at Location	Total Positions	Leader Positions	Executive Positions
Location 1	Richmond-City	Example Line of Service	10	4	2

**(Optional) Step 2(c-i): Enter Locations without Macros**

If the blue buttons were used to enter the Locations, this step can be skipped.

In the event Macros are not being used, the locations can be entered by first entering the total number in the green box.

**(Optional) Step 2(c-i): Enter Agency Locations if Not Using Macros**

If chosen not to use Macros, please enter the total number of agency locations below. The worksheet will then need to be filtered manually by going to cell "W1" and clicking the Filter Icon. This will display a menu where the checkbox next to "0" should be empty. If it is, click the "OK" button to display the objective and action item entry cells above. Enter the agency location information in the cells above.

Total Number of Agency Locations

1. Enter the Total Number of Locations



**2. Click the filter Icon to show filter menu**

**3. Verify "0" is unchecked**

**4. Click Ok**

### Step 3: Enter Agency Size & Structure Information

Step 3 is comprised of six sub steps, 4 are required and two are optional. To complete step 3, enter the total maximum employment level (MEL), Total Positions, Leader Positions, and Executive Positions by EEO Code and Employee Classifications. All prior information is optional to enter.

#### Step 3(a): Enter Maximum Employment Level (MEL)

To complete Step 3(a), enter to total MEL in the yellow box for the fiscal year reporting period.

##### *Step 3(a): Enter Maximum Employment Level (MEL)*

**Incomplete**

**INSTRUCTIONS:** Enter the maximum employment level (MEL) for the agency in the yellow boxes below for each respective fiscal year. The maximum employment level is the authorized number of salaried full-time equivalent employees at the agency from the Appropriations Act.

	FY21	FY22	FY23
Maximum Employment Level (MEL)			

**1. Enter the Agency MEL**

### Step 3(b): Enter Position Information

To complete Step 3(b), enter to total number of positions (filled and vacant) for each EEO Code and each Employee Classification by entering the total number for each in the yellow box under the reporting fiscal year column. All prior year information is optional to enter. **The number of employee classifications will vary based on the number entered on the Customization tab.**



#### Step 3(b): Enter Position Information

Incomplete

**INSTRUCTIONS:** Enter the total number of positions by EEO code and the total number of positions for each employee classification.

All Positions by EEO Code			
	FY21	FY22	FY23
Total Positions with EEO Code "Officials and Administrators"			
Total Positions with EEO Code "Professionals"			
Total Positions with EEO Code "Technicians"			
Total Positions with EEO Code "Protective Service Workers"			
Total Positions with EEO Code "Paraprofessionals"			
Total Positions with EEO Code "Administrative Support"			
Total Positions with EEO Code "Skilled Craft Workers"			
Total Positions with EEO Code "Service/Maintenance"			
Total Positions with EEO Code "Faculty"			
Total Positions with EEO Code "Other"			

1. Enter the total number of positions (filled and vacant) for each EEO Code.

All Positions by Classification			
	FY21	FY22	FY23
Total Classified Positions			
Total At-Will Positions			

2. Enter the total number of positions (filled and vacant) for each employee classification.

### Step 3(c): Enter Leader Position Information

To complete Step 3(c), enter to total number of leader positions (filled and vacant) for each EEO Code and each Employee Classification by entering the total number for each in the yellow box under the current reporting fiscal year column. Leader positions are defined as those who have at least one direct report. All prior year information is optional to enter. **The number of employee classifications will vary based on the number entered on the Customization tab.**

Leader Positions by EEO Code			
	FY21	FY22	FY23
Total Leader Positions with EEO Code "Officials and Administrators"			
Total Leader Positions with EEO Code "Professionals"			
Total Leader Positions with EEO Code "Technicians"			
Total Leader Positions with EEO Code "Protective Service Workers"			
Total Leader Positions with EEO Code "Paraprofessionals"			
Total Leader Positions with EEO Code "Administrative Support"			
Total Leader Positions with EEO Code "Skilled Craft Workers"			
Total Leader Positions with EEO Code "Service/Maintenance"			
Total Leader Positions with EEO Code "Faculty"			
Total Leader Positions with EEO Code "Other"			

1. Enter the total number of leader positions (filled and vacant) for each EEO Code.

Leader Positions by Classification			
	FY21	FY22	FY23
Total Leader Classified Positions			
Total Leader At-Will Positions			

2. Enter the total number of leader positions (filled and vacant) for each employee classification.

### **Step 3(d): Enter Executive Position Information**

To complete Step 3(c), enter to total number of executive positions (filled and vacant) for each EEO Code and each Employee Classification by entering the total number for each in the yellow box under the reporting fiscal year column. Executive positions are defined by the Agency on the Customization Tab. All prior year information is optional to enter. **The number of employee classifications will vary based on the number entered on the Customization tab.**

<u>All Executive Positions by EEO Code</u>			
	<u>FY21</u>	<u>FY22</u>	<u>FY23</u>
Total Executive Positions with EEO Code "Officials and Administrators"			
Total Executive Positions with EEO Code "Professionals"			
Total Executive Positions with EEO Code "Technicians"			
Total Executive Positions with EEO Code "Protective Service Workers"			
Total Executive Positions with EEO Code "Paraprofessionals"			
Total Executive Positions with EEO Code "Administrative Support"			
Total Executive Positions with EEO Code "Skilled Craft Workers"			
Total Executive Positions with EEO Code "Service/Maintenance"			
Total Executive Positions with EEO Code "Faculty"			
Total Executive Positions with EEO Code "Other"			

**1. Enter the total number of executive positions (filled and vacant) for each EEO Code.**

<u>All Executive Positions by Classification</u>			
	<u>FY21</u>	<u>FY22</u>	<u>FY23</u>
Total Executive Classified Positions			
Total Executive At-Will Positions			

**2. Enter the total number of executive positions (filled and vacant) for each employee classification.**

### **Step 4: Enter Agency Strategic Plan Information**

To complete step 4, identify any strategic actions or initiatives the agency is currently working towards that can be impacted by the continuity of operations or the recruitment, retention, engagement, or development of the agency workforce.

Potential sources of these actions could be the prior Workforce Planning and Development Template, Agency's Employment Opportunities Plan, One Virginia Plan, or any other strategic plan the agency may have.

**NOTE: This is not the Agency's Workforce Planning Action Plan, but merely to ensure alignment with existing actions and initiatives from other strategic plans / areas of the Agency when developing actions later in the process.**

Each item should include an overall objective statement and then specific actions items to take in order to fulfill that objective. A total of 15 objectives can be added per plan and a total of 5 action items can be added per objective.

**If Not Using the Excel Macros, Skip to Step 4(a)**

To add an objective, click the blue “Add Objective Button”, this will show the objective description box.

FOUNDATIONAL

**Step 4: Enter Agency Strategic Plan Information** Incomplete

**INSTRUCTIONS:** Please identify any strategic actions or initiatives the agency is currently working towards that can be impacted by the continuity of operations or the recruitment, retention, engagement, or development of the agency workforce. Potential sources of these actions items could be the prior Workforce Planning and Development Template, Agency's Employment Opportunities Plan, One Virginia Plan, or any other strategic plan the agency may have. The format of this section is to have an overall objective statement and specific action items. Objectives can be added by clicking the "Add Objective" button, for a total of 15 overall objectives.

Click for Help if needed

**Add Objective** Remove Last Objective

1. Click the “Add Objective” to see Objective Entry Box (below)

**Objective** Incomplete

Please enter the item objective statement and corresponding action items. Action items can be added by clicking the "Add Action Item" button, for a total of 5 action items per each objective. Action items should describe what the action is and how it will be measured.

Overall Objective Statement

2. Enter the Objective Statement (brief) into the yellow box.

**Add Action Item** Remove Last Item

3. Click the “Add Action Item” button to see the Action Item Entry box

**Objective** Incomplete

Please enter the item objective statement and corresponding action items. Action items can be added by clicking the "Add Action Item" button, for a total of 5 action items per each objective. Action items should describe what the action is and how it will be measured.

Overall Objective Statement

**Add Action Item** Remove Last Item

Action Item

4. Enter the Action Item in the Yellow Box

5. Click the “Add Action Item” button again to add up to 4 more Action Items (Shown Below)

Action items can be removed by clicking the “Remove Last Item” purple button. This will remove the last action item that was added.

## Objective

Incomplete

Please enter the item objective statement and corresponding action items. Action items can be added by clicking the "Add Action Item" button, for a total of 5 action items per each objective. Action items should describe what the action is and how it will be measured.

Overall Objective Statement

Add Action Item

Remove Last Item

Action Item

Click to  
Remove Last  
Added  
Action Item

These steps should be repeated for any additional objectives (up to 15) added to the strategic action plan. In the event an objective should be removed, click the "Remove Objective" purple button. This will remove the objective and all action items.

Add Objective

Remove Last  
Objective

Click to Remove Last Objective  
Added (will also remove all  
action items for that objective)

### (Optional) Step 4(a): Create an Agency Strategic Plan Information without Macros

If the blue buttons were used to enter the Strategic Plan Information, this step can be skipped.

In the event Macros are not being used, the agency strategic plan information can be entered by first entering the total number of objectives and total number of action items for each objective in the green boxes.

### (Optional) Step 4(a): Enter Objectives & Action Items if Not Using Macros

If chosen not to use Macros, please enter the total number of objectives and the total number of action items for each objective below. The worksheet will then need to be filtered manually by going to cell "W1" and clicking the Filter Icon. This will display a menu where the checkbox next to "0" should be empty. If it is, click the "OK" button to display the objective and action item entry cells above. Enter the objective and action item information in the respective cells above.

Total Objectives	<input type="text"/>
Total Objective 1 Action Items	<input type="text"/>
Total Objective 2 Action Items	<input type="text"/>
Total Objective 3 Action Items	<input type="text"/>
Total Objective 4 Action Items	<input type="text"/>
Total Objective 5 Action Items	<input type="text"/>
Total Objective 6 Action Items	<input type="text"/>
Total Objective 7 Action Items	<input type="text"/>
Total Objective 8 Action Items	<input type="text"/>
Total Objective 9 Action Items	<input type="text"/>
Total Objective 10 Action Items	<input type="text"/>
Total Objective 11 Action Items	<input type="text"/>
Total Objective 12 Action Items	<input type="text"/>
Total Objective 13 Action Items	<input type="text"/>
Total Objective 14 Action Items	<input type="text"/>
Total Objective 15 Action Items	<input type="text"/>

1. Enter the  
Total Number  
of Objectives

**(Optional) Step 4(a): Enter Objectives & Action Items if Not Using Macros**

*If chosen not to use Macros, please enter the total number of objectives and the total number of action items for each objective below. The worksheet will then need to be filtered manually by going to cell "W1" and clicking the Filter Icon. This will display a menu where the checkbox next to "0" should be empty. If it is, click the "OK" button to display the objective and action item entry cells above. Enter the objective and action item information in the respective cells above.*

Total Objectives	5
Total Objective 1 Action Items	2
Total Objective 2 Action Items	3
Total Objective 3 Action Items	1
Total Objective 4 Action Items	5
Total Objective 5 Action Items	4
Total Objective 6 Action Items	
Total Objective 7 Action Items	
Total Objective 8 Action Items	
Total Objective 9 Action Items	
Total Objective 10 Action Items	
Total Objective 11 Action Items	
Total Objective 12 Action Items	
Total Objective 13 Action Items	
Total Objective 14 Action Items	
Total Objective 15 Action Items	

**2. Enter the Total Number of Action Items for Each Objective**

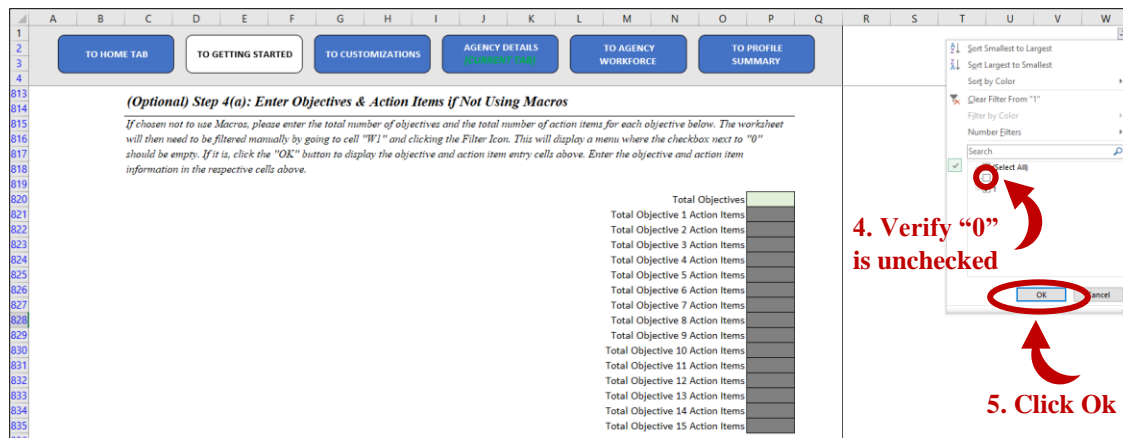
**NOTE: If there is no objective, the box will be grayed out and can be left empty**

After the numbers are entered, click on the Filter Icon in cell W1 to show the filter menu (top right corner). Ensure there is no check box next to "0" (zero) and then click okay to filter the sheet.

Total Objectives	5
Total Objective 1 Action Items	2
Total Objective 2 Action Items	3
Total Objective 3 Action Items	1
Total Objective 4 Action Items	5
Total Objective 5 Action Items	4
Total Objective 6 Action Items	
Total Objective 7 Action Items	
Total Objective 8 Action Items	
Total Objective 9 Action Items	
Total Objective 10 Action Items	
Total Objective 11 Action Items	
Total Objective 12 Action Items	
Total Objective 13 Action Items	
Total Objective 14 Action Items	
Total Objective 15 Action Items	

**3. Click the filter Icon to show filter menu**





Scroll up on the sheet to see the entry boxes for all objective and action items. The objective and action item numbers can be changed using this same process. If the objective number decreases, ensure all grayed out cells for the action items are empty, otherwise the data will not filter correctly.

### **(Optional) Step 5: Check Spelling**

The template allows for the spell check feature to be used on this tab, however, Macros must be enable to use this feature. Click the “Spell Check This Tab” purple button, which will launch the Excel spell check function.

#### **(Optional) Step 5: Check Spelling**

**INSTRUCTIONS:** To check the spelling of items on this tab, please click the blue "Spell Check This Tab" button below. Correcting the spelling on this tab will ensure the report is correct as well.



## **Agency Workforce Tab**

This tab identifies employee demographic information, broken down by race, gender, EEO code, classifications, employees with disabilities and veteran status for all employees, employees who are leaders, and executives. Employees with disabilities and veterans are further broken down by EEO code and classifications.

Before completing any steps on the Agency Workforce Tab, the employee classification lists will need to be refreshed (if indicated they are not up to date). To refresh employee classifications, click the blue “Click to Refresh Employee Classifications” button.

### **Before**



*Employee Classifications Need to Be Refreshed.*

Click to Refresh  
Employee Classifications

### After

*Employee Classifications are Up to Date.*

Click to Refresh  
Employee Classifications

If not using Macros, the employee classification list can be refreshed by going to cell “W1” and clicking the filter icon. After, ensure the “0” box is unchecked, click Ok.

### Step 1: Enter Employee Demographic Information

To complete Step 1, enter the total number of employees, broken out by gender, race, EEO Code Employee Classification, Employees with disabilities, and veteran status by entering the total number for each in the yellow box under the reporting fiscal year column. All prior year information is optional to enter. **The number of employee classifications will vary based on the number entered on the Customization tab.**

<u>Total Employees by Gender</u>			
	<u>FY21</u>	<u>FY22</u>	<u>FY23</u>
Total Male Employees			
Total Female Employees			

1. Enter the total number employees for each gender.

<u>Total Employees by Race</u>			
	<u>FY21</u>	<u>FY22</u>	<u>FY23</u>
Total American Indian or Alaskan Native Employees			
Total Asian Employees			
Total Black or African American Employees			
Total Hispanic or Latino Employees			
Total Native Hawaiian or Other Pac. Islander Employees			
Total White Employees			
Two or More Races			
Total Race Unknown or not Entered Employees			

2. Enter the total number employees for each race.

<u>Total Employees by EEO Code</u>			
	<u>FY21</u>	<u>FY22</u>	<u>FY23</u>
Total EEO Code Officials and Administrators			
Total EEO Code Professionals			
Total EEO Code Technicians			
Total EEO Code Protective Service Workers			
Total EEO Code Paraprofessionals			
Total EEO Code Administrative Support			
Total EEO Code Skilled Craft Workers			
Total EEO Code Service/Maintenance			
Total EEO Code Faculty			
Total EEO Code Other			

3. Enter the total number employees for each EEO Code.

<u>Total Employees by Classification</u>			
	<u>FY21</u>	<u>FY22</u>	<u>FY23</u>
Total Classified Employees			
Total At-Will Employees			

4. Enter the total number employees for each employee classification.

<u>Additional Employee Demographics</u>			
	<u>FY21</u>	<u>FY22</u>	<u>FY23</u>
Total Employees with Disabilities			
Total Veterans			

5. Enter the total number employees with disabilities and veterans.

## Step 2: Enter Leader Demographic Information

To complete Step 2, enter to total number of leaders (defined as individuals with at least one direct report), broken out by gender, race, EEO Code Employee Classification, Employees with disabilities, and veteran status by entering the total number for each in the yellow box under the fiscal year reporting period column. All prior year information is optional to enter. **The number of employee classifications will vary based on the number entered on the Customization tab.**

<u>Total Leaders by Gender</u>			
	<u>FY21</u>	<u>FY22</u>	<u>FY23</u>
Total Male Leaders			
Total Female Leaders			

1. Enter the total number leaders for each gender.

<u>Total Leaders by Race</u>			
	<u>FY21</u>	<u>FY22</u>	<u>FY23</u>
Total American Indian or Alaskan Native Leaders			
Total Asian Leaders			
Total Black or African American Leaders			
Total Hispanic or Latino Leaders			
Total Native Hawaiian or Other Pac. Islander Leaders			
Total White Leaders			
Two or More Races			
Total Race Unknown or not Entered Leaders			

2. Enter the total number leaders for each race.

<u>Total Leaders by EEO Code</u>			
	<u>FY21</u>	<u>FY22</u>	<u>FY23</u>
Total Leader EEO Code Officials and Administrators			
Total Leader EEO Code Professionals			
Total Leader EEO Code Technicians			
Total Leader EEO Code Protective Service Workers			
Total Leader EEO Code Paraprofessionals			
Total Leader EEO Code Administrative Support			
Total Leader EEO Code Skilled Craft Workers			
Total Leader EEO Code Service/Maintenance			
Total Leader EEO Code Faculty			
Total Leader EEO Code Other			

3. Enter the total number leaders for each EEO Code.

<u>Total Leaders by Classification</u>			
	<u>FY21</u>	<u>FY22</u>	<u>FY23</u>
Total Classified Leaders			
Total At-Will Leaders			

4. Enter the total number leaders for each employee classification.

<u>Additional Leader Demographics</u>			
	<u>FY21</u>	<u>FY22</u>	<u>FY23</u>
Total Leaders with Disabilities			
Total Veterans Leaders			

5. Enter the total number leaders with disabilities and veterans.

## Step 3: Enter Executive Demographic Information

To complete Step 3, enter to total number of executives (defined by the agency), broken out by gender, race, EEO Code Employee Classification, Employees with disabilities, and veteran status by entering the total number for each in the yellow box under the reporting fiscal year column. All prior year information is optional to enter. **The number of employee classifications will vary based on the number entered on the Customization tab.**

<u>Total Executives by Gender</u>			
	FY21	FY22	FY23
Total Male Executives			
Total Female Executives			

1. Enter the total number of executives for each gender.

<u>Total Executives by Race</u>			
	FY21	FY22	FY23
Total American Indian or Alaskan Native Executives			
Total Asian Executives			
Total Black or African American Executives			
Total Hispanic or Latino Executives			
Total Native Hawaiian or Other Pac. Islander Executives			
Total White Executives			
Two or More Races			
Total Race Unknown or not Entered Executives			

2. Enter the total number of executives for each race.

<u>Total Executives by EEO Code</u>			
	FY21	FY22	FY23
Total Executive EEO Code Officials and Administrators			
Total Executive EEO Code Professionals			
Total Executive EEO Code Technicians			
Total Executive EEO Code Protective Service Workers			
Total Executive EEO Code Paraprofessionals			
Total Executive EEO Code Administrative Support			
Total Executive EEO Code Skilled Craft Workers			
Total Executive EEO Code Service/Maintenance			
Total Executive EEO Code Faculty			
Total Executive EEO Code Other			

3. Enter the total number of executives for each EEO Code.

<u>Total Executives by Classification</u>			
	FY21	FY22	FY23
Total Classified Executives			
Total At-Will Executives			

4. Enter the total number of executives for each employee classification.

<u>Additional Executive Demographics</u>			
	FY21	FY22	FY23
Total Executives with Disabilities			
Total Veterans			

5. Enter the total number of executives with disabilities and veterans.

#### **Step 4: Enter Demographic Information for Employees with Disabilities**

To complete Step 4, enter to total number of employees with disabilities for each EEO Code and Employee Classification by entering the total number for each in the yellow box under the reporting fiscal year column. All prior year information is optional to enter. **The number of employee classifications will vary based on the number entered on the Customization tab.**

<u>Total Employees with Disabilities by EEO Code</u>			
	FY21	FY22	FY23
Total Employees with Disabilities EEO Code Officials and Administrators			
Total Employees with Disabilities EEO Code Professionals			
Total Employees with Disabilities EEO Code Technicians			
Total Employees with Disabilities EEO Code Protective Service Workers			
Total Employees with Disabilities EEO Code Paraprofessionals			
Total Employees with Disabilities EEO Code Administrative Support			
Total Employees with Disabilities EEO Code Skilled Craft Workers			
Total Employees with Disabilities EEO Code Service/Maintenance			
Total Employees with Disabilities EEO Code Faculty			
Total Employees with Disabilities EEO Code Other			

1. Enter the total number of employees with disabilities for each EEO Code.

<u>Total Employees with Disabilities by Classification</u>			
	FY21	FY22	FY23
Total Classified Employees with Disabilities			
Total At-Will Employees with Disabilities			

2. Enter the total number of employees with disabilities for each employee classification.

### **Step 5: Enter Demographic Information for Veterans**

To complete Step 5, enter to total number of veterans for each EEO Code and Employee Classification by entering the total number for each in the yellow box under the reporting fiscal year column. All prior information is optional to enter. **The number of employee classifications will vary based on the number entered on the Customization tab.**

<u>Total Veterans by EEO Code</u>			
	FY21	FY22	FY23
Total Veteran EEO Code Officials and Administrators			
Total Veteran EEO Code Professionals			
Total Veteran EEO Code Technicians			
Total Veteran EEO Code Protective Service Workers			
Total Veteran EEO Code Paraprofessionals			
Total Veteran EEO Code Administrative Support			
Total Veteran EEO Code Skilled Craft Workers			
Total Veteran EEO Code Service/Maintenance			
Total Veteran EEO Code Faculty			
Total Veteran EEO Code Other			

1. Enter the total number of veterans for each EEO Code.

<u>Total Veterans by Classification</u>			
	FY21	FY22	FY23
Total Classified Veterans			
Total At-Will Veterans			

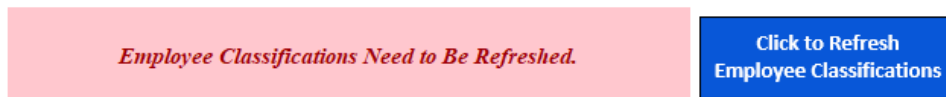
2. Enter the total number of veterans for each employee classification.

## **Profile Summary Tab**

The Profile Summary is an optional tab that can be used to explore information in the agency profile by fiscal year and demographic (employee, leader, executive). It provides an overview of the agency operations and the agency workforce. The workforce insights section (noted with the blue background) can be exported as a PDF to be a standalone summary if desired.

Before completing any steps on the Agency Details Tab, the employee classification lists will need to be refreshed (if indicated they are not up to date). To refresh employee classifications, click the blue “Click to Refresh Employee Classifications” button.

### Before



### After



If not using Macros, the employee classification list can be refreshed by going to cell “W1” and clicking the filter icon. After, ensure the “0” box is unchecked, click Ok.

### (Optional) Step 1: Review the Workforce Insights of the Agency Profile

The Workforce Insights section provides a breakdown of agency positions and workforce demographics. The information can be filtered based on fiscal year and demographic (non-leader, leader, executive, or all employees) by using the dropdown menu in the boxes highlighted yellow.

After selecting the yellow box, click the drop down arrow on the right to see the dropdown menu and select the desired filter.



After Agency Profile Summary can also be formatted as an Appendix to be attached to the full Agency Wide Workforce plan. To format it as an Appendix, click on the toggle switch next to the format question to change it to “On”. This will automatically format the Appendix with the same header as the workforce plan and note it as an Appendix (shown below).



To return to the original format, simply click on the toggle switch to change it to “Off” and the format reverts back to its original state.

### **(Optional) Step 2: Export the Summary to PDF**

By default, the date of the summary is the current date. However, if the summary should reflect a different date, a new date can be entered in the green box (shown below).

#### ***(Optional) Step 2: Export the Workforce Insights to PDF***

**INSTRUCTIONS:** Click the blue button below to Export the Workforce Insights section to a PDF. The report will be exported to reflect today's date by default, but the date that appears on the report may be adjusted using the date box below.

Enter Date to be reflected on Summary (if different from Today): MM/DD/YY

**1. Enter new date if needed.**

Export Workforce Insights to PDF

The summary can be exported as a PDF by clicking the “Export Workforce Insights to PDF” blue button. This will open a dialog box to save the PDF using the standard process to save a file. The report can be viewed by going to the saved location and opening the file.

### **(Optional) Step 2: Printing the Summary to PDF (without Macros)**

If not using the Macros, the report can be printed as a PDF using the standard Excel print function. Go to the “File” menu, and select print. Ensure the printer is “Microsoft Print to PDF” and click “Print”. Choose the save location and click “Save”. The report can be viewed by going to the saved location and opening the file.

## 5.0 Internal Tool Setup



### WORKFORCE PLANNING AND DEVELOPMENT SUB AGENCY, INTERNAL DEPARTMENT, OR TEAM INPUT

If this tool is enabled (see Step 3 of the Customizations Tab Section), the initial setup of using this tool is completed in the Agency Profile on the Sub-Agency and Internal Tool tab. The Internal Plan Review tab is to track which internal plans have been imported back into the profile and to review the free response elements pertaining to the Agency Profile.

### Sub-Agency & Internal Tool Tab

This tab is used to setup the Sub-Agency, Internal Department, or Team Input tool for the Agency workforce plans. The tool is designed to have specific groups go through the entire workforce planning process or selective sections of the process, to support the overall Agency workforce planning process. The initial setup begins with identifying the groups who will complete the tool and the specific sections each will complete. After, the tool can be imported back into the Agency Profile Template and the Agency Strategy Template and be reviewed on the Internal Plan Review Tabs.

#### **Step 1: Enter Sub-Agency, Internal Departments, or Internal Team Names**

To complete Step 1, enter the groups that will be using the internal tool (either sub agencies, internal departments, or internal teams). Select which type of group to be entered using the dropdown menu in the yellow box and then click the “Add Selected Group Button”.

**Click for Help if needed**

**Step 1: Enter Sub Agency, Internal Department, or Internal Team Names** Complete

**INSTRUCTIONS:** Enter the groups that will be using the internal tool by selected the respective group (either a sub-agency, department, or team) from the yellow box below using the dropdown menu and then clicking the "Add Selected Group" blue button. Enter the name and a brief description for the selected group. Up to 20 different groups can be added for each type.

Select Which Group Type to Add/Remove: Sub-Agency

**2. Click the add selected group button.** Add Selected Group Remove Last Selected Group

**1. Select a group from the dropdown menu.**

**Sub Agencies**

Sub-Agency Name	Description (Very Brief)
Example	Example Description

**1. Enter the Name.** **2. Enter a brief description.**



The space to enter the name and brief description of the group will be shown for the respective group type selected. Enter the name and the brief description. Repeat this process for each group that will be using the tool. Up to 20 names can be added per group (sub agency, internal department, or internal team).

To remove the last name from a group, select the group type from the dropdown menu and then click the Remove Last Selected Group button.



#### Step 1: Enter Sub Agency, Internal Department, or Internal Team Names

Complete

**INSTRUCTIONS:** Enter the groups that will be using the internal tool by selected the respective group (either a sub-agency, department, or team) from the yellow box below using the dropdown menu and then clicking the "Add Selected Group" blue button. Enter the name and a brief description for the selected group. Up to 20 different groups can be added for each type.

Select Which Group Type to Add/Remove:

Sub-Agency

Add Selected Group

Remove Last Selected Group

2. Click to remove last name from the selected group.

1. Select a group from the dropdown menu.

#### (Optional) Step 2: Enter Sub-Agency, Internal Departments, or Internal Team Names

By default, all sections of the internal tool are included for each sub agency, department or team added. However, settings can be updated to identify which specific sections of the workforce planning process and internal tool to be included for each sub agency, department, or team.

To update the settings, select the name of the sub-agency, department, or team from the dropdown menu and click the update settings button.



#### (Optional) Step 2: Customize Settings for Each Group that will use the Internal Tool

**INSTRUCTIONS:** By default, all sections of the internal tool are included for each group identified in Step 1. Agencies may create custom settings for any group by clicking the "Update Settings" button to view the settings dialog box. Navigate to the specific section of the workforce planning process to update the settings. Any items selected will be included and items not selected will be hidden from view when importing the Agency Profile into the Internal Tool.

Select Name to Update Settings:

Example1

2. Click the Update Settings button.

Update Settings


1. Select the name from the dropdown menu.

#### Sub Agencies

Sub-Agency Name	Add Data	Profile	COO	Recruit	Reten.	WF Dev.	Future	Strategy	Summary	
Example1	Yes	All	All	All	All	All	All	All	All	
Example2	Yes	All	All	All	All	All	All	All	All	

A form dialog box will open for the specific sub agency, department, or team selected. Each tab of the dialog box corresponds to the tabs of the Internal Tool, with the items on each tab representing the sections of the internal tool tabs. By default, all checkboxes are checked, indicating all sections of the internal tool will be included. To hide a section of the tool from view, uncheck the respective box and then click the Update Settings button.

Update Settings for Internal Tool



**WORKFORCE PLANNING AND DEVELOPMENT**  
SUB AGENCY, INTERNAL DEPARTMENT, OR TEAM INPUT  
**UPDATE SETTINGS**

Example1

Retention / Engagement General and Profile	WF Development Continuity of Operations	Future / Strategy / Plan Summary Recruitment
---	--	---

☒ Add data from internal tool to existing data in the templates. If checked, when the Internal Tool is imported into the Agency Profile or Agency Strategy File, the quantitative data elements included will be added to the existing data already entered.

Profile Tab Settings


<input checked="" type="checkbox"/> Agency Name	<input checked="" type="checkbox"/> All Positions	<input checked="" type="checkbox"/> Employee Demographics	<input checked="" type="checkbox"/> Employees with Disabilities
<input checked="" type="checkbox"/> Agency Mission	<input checked="" type="checkbox"/> Leader Positions	<input checked="" type="checkbox"/> Leader Demographics	<input checked="" type="checkbox"/> Veterans
	<input checked="" type="checkbox"/> Executive Positions	<input checked="" type="checkbox"/> Executive Demographics	

Update Settings
Exit Settings

Checkbox Indicates Section is Included.

Tabs correspond to tabs in Internal Tool.

Update Settings for Internal Tool



**WORKFORCE PLANNING AND DEVELOPMENT**  
SUB AGENCY, INTERNAL DEPARTMENT, OR TEAM INPUT  
**UPDATE SETTINGS**

Example1

Retention / Engagement General and Profile	WF Development Continuity of Operations	Future / Strategy / Plan Summary Recruitment
---	--	---

☒ Add data from internal tool to existing data in the templates. If checked, when the Internal Tool is imported into the Agency Profile or Agency Strategy File, the quantitative data elements included will be added to the existing data already entered.

Profile Tab Settings

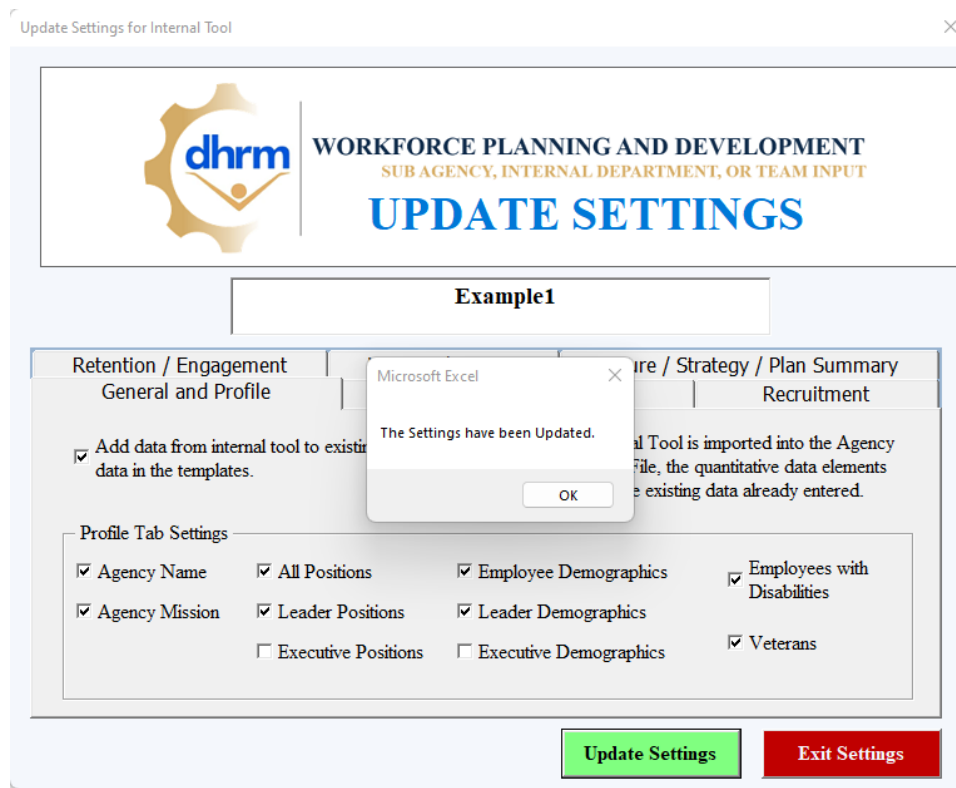
<input checked="" type="checkbox"/> Agency Name	<input checked="" type="checkbox"/> All Positions	<input checked="" type="checkbox"/> Employee Demographics	<input checked="" type="checkbox"/> Employees with Disabilities
<input checked="" type="checkbox"/> Agency Mission	<input checked="" type="checkbox"/> Leader Positions	<input checked="" type="checkbox"/> Leader Demographics	<input checked="" type="checkbox"/> Veterans
	<input type="checkbox"/> Executive Positions	<input type="checkbox"/> Executive Demographics	

Update Settings
Exit Settings

Uncheck box to hide section in Internal Tool.

Click Update Settings to Save New Settings.

After a brief delay while the settings are updated, a dialog box will appear indicating the new settings have been saved. Click Ok and then click “Exit Settings” to go back to the Agency Profile template.



Click Ok and then Exit Settings to Return back to Template.

The table is updated to reflect which sections include all elements, have custom settings, or are not included.

#### Sub Agencies

Sub-Agency Name	Add Data	Profile	COO	Recruit	Reten.	WF Dev.	Future	Strategy	Summary	
Example1	Yes	Custom	All	All	All	All	All	All	All	
Example2	Yes	All	All	All	All	All	All	All	All	

Repeat this process to update the settings for any additional sub agencies, departments, or teams.

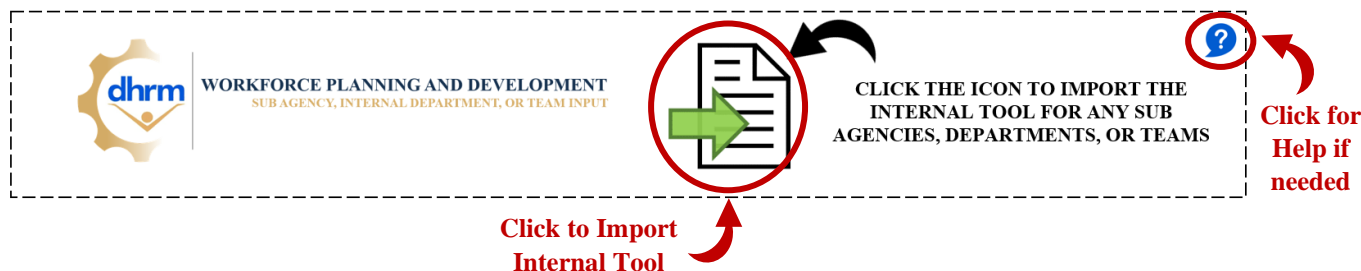
## Internal Plan Review Tab

This tab is used to import and review information from the Sub-Agency, Internal Department, or Team Input Tool related to the Agency Profile. This tab provides a quick glance tracker to know which plans have been imported, the date they were imported, and whether the data is still within

the template. Information pertaining to the Agency Profile can be easily viewed for comparison and completing the Agency Profile template.

### **Step 1: Importing Internal Tools for each Respective Group**

To import Internal Tools, click on the import data icon (white paper with green arrow) for the internal tool and follow the steps outlined in the Getting Started Tab section of these instructions.



After a tool is imported, the quick glance section in Step 1 will be updated to show the imported status, last imported date, and whether data from the tool is currently in the Agency Profile template (shown below).

#### ***Sub Agencies***

Sub-Agency Name	Current Import Status	Last Imported Date	Data In Template
Example1	Imported	4/4/23 4:59 PM	Data In Template
Example2	Imported	4/5/23 8:49 AM	Data In Template

### **(Optional) Step 2: Review Open Responses from the Internal Tool (for the Agency Profile)**

To quickly review any free response questions pertaining to the Agency Profile (Agency Mission and Strategic Objectives), select which response to review from the drop-down menu. This will automatically update the responses for each respective Sub Agency, Internal Department, or Internal team (shown below).

#### ***(Optional) Step 2: Review Open Responses from the Imported Internal Plans (For the Agency Profile)***

**INSTRUCTIONS:** To review information pertaining to the Agency Profile Template, select the information to view from the dropdown in the yellow box below. After, for each group that that was imported, the respective information will be shown for the Agency to review easily. This information can then be used as a reference to complete the remaining sections of the Agency Profile Template.

Select the Information to View

Agency Mission

1. Select which response type to view.

#### ***Sub Agencies***

Example1	Example Mission
Example2	Example Mission

### **(Optional) Step 3: Clear Data from Imported Internal Tools**

Once data from any internal plans is imported, it remains in the Agency Profile template unless manually cleared using the “Clear Data” gold button (shown below). This will remove all imported data from all internal tools.

#### ***(Optional) Step 3: Clear Data from Imported Internal Tools***

---

**INSTRUCTIONS:** The data from the imported internal plans can remain in the template. However, if the Agency is more comfortable with removing the data, it can be removed by clicking the “Clear Data” button below. This will remove all imported internal plan information.



**1. Click to remove data  
imported from internal plans.**

## 6.0 Next Steps

The Agency Profile can be imported directly into other Workforce Planning Tools and Templates (examples below). This will automatically populate certain information into those tools, based on the purpose and design of each tool.



### WORKFORCE PLANNING AND DEVELOPMENT ANALYTIC TOOLS IDENTIFYING CRITICAL ROLES



### WORKFORCE PLANNING AND DEVELOPMENT SUB AGENCY, INTERNAL DEPARTMENT, OR TEAM INPUT

#### **For Questions or Additional Assistance**

For questions or assistance with the template, please contact DHRM Workforce Planning at [dhrm.wfp@dhrm.virginia.gov](mailto:dhrm.wfp@dhrm.virginia.gov).



## 7.0 Appendix

### Cardinal Report Information

Agencies still have access to historical data using the HuRman e480 report tool. The Cardinal reports are set up differently and may be a little more cumbersome, especially since we are just learning how to use them. However, agencies have direct access to their own data. You may want to review the Catalog of reports listed under the Resources tab on the Cardinal Webpage to determine which ones best meet your needs. In addition to the Job Data reports, you may want to review:

- Employee Disability and Veterans Status
- Employee Turnover
- Job Group Diversity
- Separations

The Cardinal team has an HCM Reports Job Aid tool and a Learning webinar to assist with running the reports.